WISCAT Union Catalog -- Adding, Deleting, Modifying Holdings

This functionality is available to libraries having a current WISCAT license
and maintaining holdings on *existing* records in the Union Catalog

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When no record for an item is available in the Union Catalog to add your library holding, use the copy cataloging function to copy the appropriate record found in any of the other library catalogs searchable in WISCAT.

See guide entitled, *WISCAT Union Catalog -- Copy Cataloging*

Log into your library's WISCAT as staff
    Library: **XXXX**
    Username: **XXXX**
    Password: [your staff password here]

ADD A LOCATION

1. Select the **Advanced Search** and in the **Choose Resources section** clear all check marks *except* the WISCAT Union Catalog. Library holdings can only be added to the Union Catalog bibliographic records.

2. Enter the title or ISBN or other information into the search box(es).   You may either use the **Narrow Your Search** (only works with the Union Catalog) before searching or use the facets such as Format after obtaining search results.

Either method may be used to limit a search by specific format, publication date, etc.

3. Click on the Submit button.

4. Use the facets such as Format, Publisher, etc., in the left navigation pane to narrow the search results if necessary. Look through the search results to find a record correctly matching your library item.

5. Click on the catalog name (WISCAT Union Catalog) or the bookjacket art or on View Full Details to access the Full Record Display. Use your judgment in determining if you have the same "bibliographic" entity as an existing record in the Union Catalog.

6. In the full record display, the **Staff Functions** area is to the right side. Select **Add Locations** (see image below).

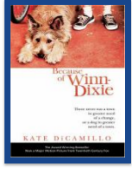**6a.** If the **Add Location** pop-up window appears, your library name should automatically display in the "Select a library to add holding Location" field; then click on *Select Library*.

6b. Enter the **Call Number** into the textbox and scroll down to click on **Add**

Add Location ✖

Title:	Because of Winn-Dixie
Author:	DiCamillo, Kate
Publisher:	Thorndike Press,
Date:	2005.
Format:	lpt

$r Region	SG
$l Library ID	AAAA
$a Call Number	F DiC
$p Barcode	
$v Volumes	
$y Years	
$n Notes	

[Add] [Close]

6c. On the next screen is the option to *Add Another Holding*; otherwise, click **Submit.**

Add Location ✖

Title:	Because of Winn-Dixie
Author:	DiCamillo, Kate
Publisher:	Thorndike Press,
Date:	2005.
Format:	lpt

Add Another Holding for This Location

If you are finished adding locations, click Submit to save the record to the database

[Submit] [Close]

7. Refresh the screen to see the holdings display on the bibliographic record.

When your library holding is on a WISCAT Union Catalog record there are additional **Staff Functions** available to **Edit or Delete Locations**.

 EDIT A LOCATION
 To modify an existing location Call Number, etc., access the Full Record Display and click **Edit Locations**; make the desired change, then click **Update Holding.**

Confirm the change by clicking **Submit**

DELETE A LOCATION

To remove an existing location from the Union Catalog record, open to the Full Record Display; in the **Staff Functions** select **Delete Locations**.   In the window that displays, click **Confirm Delete Location**.

Note: If your library has more than one holding on the record, select the location or locations to be removed, click Confirm Delete Location.

Delete Location ✖

Title:	Because of Winn-Dixie
Author:	DiCamillo, Kate
Publisher:	Thorndike Press,
Date:	2005.
Format:	lpt

The following location will be deleted

Lib Code	Call Number	Holding Content
AAAA	F DiC	$r SG $l AAAA $a F DiC $p $v $y $n

[Confirm Delete Location]   [Close]

Then click **Submit**

Delete Location ✖

Title:	Because of Winn-Dixie
Author:	DiCamillo, Kate
Publisher:	Thorndike Press,
Date:	2005.
Format:	lpt

If you are finished deleting holdings for this location, click Submit to delete holding from this record.

[Submit]   [Close]

LOCATION GROUP and SCOPING LEVEL can be created to make it easier to identify Union Catalog records that have your library holdings on them.

Location Group will automatically bring your library holding information to the top within a full record display

S**coping Level** is used to limit a search to your library holdings on records in the WISCAT Union Catalog

CREATE SCOPING LEVELS AND LOCATION GROUPS

Logged in as Staff in the **Staff Dashboard** go to the **Pac Admin** menu; select **Define/Maintain Location Groups**.

Name the Location Group and click Submit. A **Configure** button will then display BUT *do not use it*; close the screen and return to the Staff Dashboard.

Up to 9 groups may be created. However, an individual library can only be assigned to one Location Group.

Return to the **Staff Dashboard** and the **Pac Admin** menu; this time select **Define/Maintain Scoping Levels**

Name the scoping level and click Submit.

The screen will refresh to display a Configure button for the new Scoping level; click on **Configure**

Click on Configure to display the following screen; use the View dropdown menu and select the **Selected Libraries** option and click Submit.

In the **Library Name** textbox enter a word or two from the WISCAT name of the library, click Submit

Any libraries including the word(s) entered will display as shown below. Click a check mark in the small box associated with the library to be included in the Scoping Level; then use the dropdown menu to select the Location Group (*My Library* in this example.
Unlike the Location Group, a library may be assigned to more than one Scoping Level.

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